eCopy ShareScan® 5.0

Configuration Guide

for HP Trim Connector

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HP Trim Connector

This document covers the installation, configuration and usage of the Trim connector for eCopy ShareScan 5.

The Trim Connector for eCopy ShareScan allows documents to be scanned directly from a multifunction device or dedicated scanner into Trim System using eCopy ShareScan 5.

By using this connector you can authenticate with your existing Trim account and allow users to select which Record Type they are creating an instance of, along with being able to populate the fields associated with that type.

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1 - Prerequisites

- Trim 6.x
- .NET Framework 3.5 or better must be installed on the ShareScan Manager Server.
- The Trim Workgroup Server must be reachable over the network from the ShareScan Manager.
- The Trim Desktop Client for the appropriate version of Trim must be installed on the ShareScan Manager.

2 - Connector installation

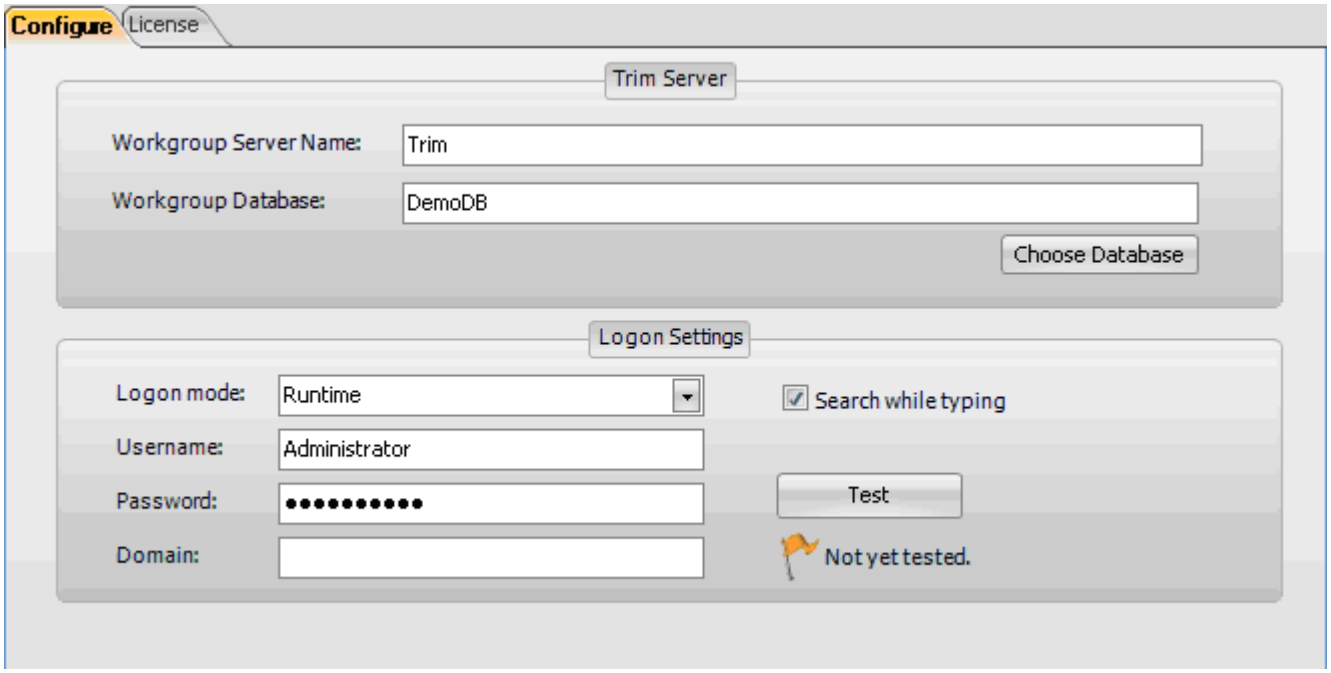
1. Run the installer MSI installer package and click **Next** to start the installation wizard.
2. Either use the default installation location or choose an alternative location.
3. Click **Next** to confirm the setting and proceed with the installation
4. After the installation is finished, start the ShareScan Administration Console to configure the connector.
5. Navigate to the folder where the Trim Client software is installed (typically **C:\Program Files\TRIM Context**). Set the permissions on the **ServerData** and **ServerLocalData** to full permissions for the account the ShareScan Manager service is running under, and also full permissions for any domain user (or group of users) using the connector.

3 - Connector settings

The following sections outline the various connector settings that apply to the HP Trim connector. To configure the connector, click the **Edit** button of the **Configure** tab.

3.1- Configuration tab

The configuration tab allows the administrator to set the access properties to the HP Trim Database.

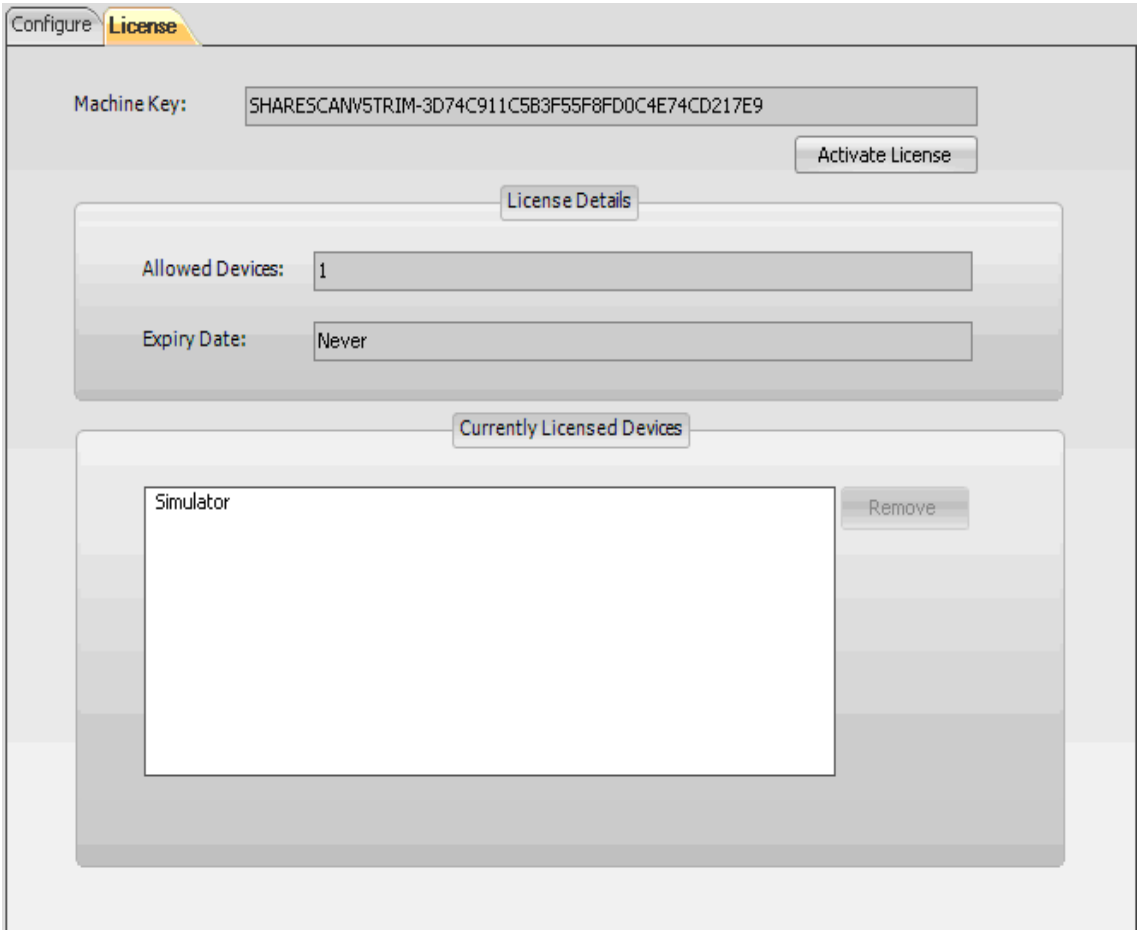


Field Name	Description
Trim Server	Displays the Server name and Database properties of the chosen Trim

Field Name	Description
	Database.
Choose Database	Click this button to open up the standard **Open TRIM Context Dataset** dialog. From here you can add/select the database that you wish to connect to. Once a database has been selected, the Server Name and Database boxes are automatically populated.
Logon Settings	Allows you to enter logon credentials and specify the logon mode. The following logon options are available: • Runtime: uses the ShareScan session credentials to logon to Trim. • Default logon: the credentials set in the username/password/domain textboxes in the Administration Console are used. You can check the **Search while typing** checkbox to enable autocompletion of the logon fields on the client forms.
Test	Click this button to test the access credentials you entered.

3.2- Licensing tab

After running the installer, the connector needs to be licensed with Paper River Consulting.

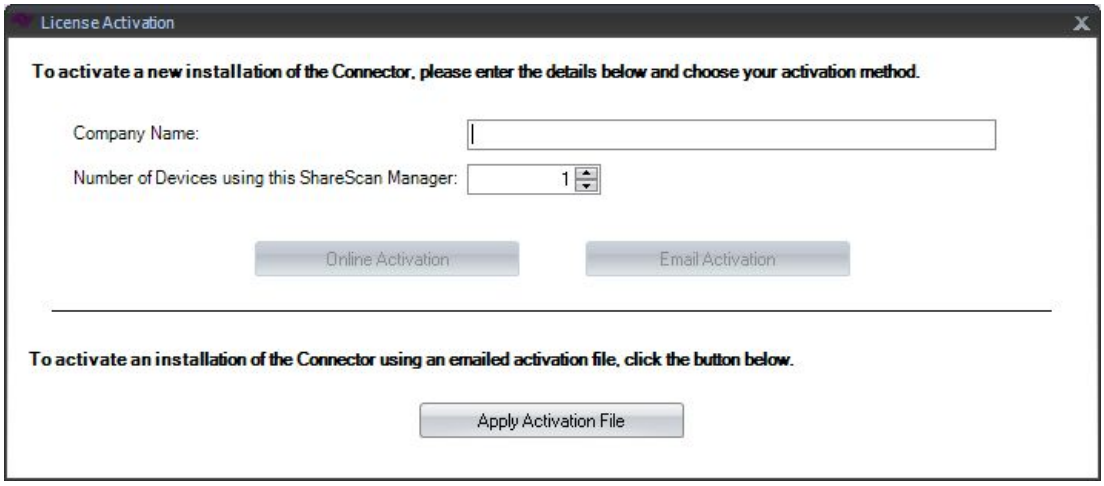


Field Name	Description
Machine Key	Displays the machine key.
Activate License	Click this button to start activating your Sage license. For more details, see below.
Allowed Devices	Displays how many devices are allowed by the license to be running with the connector enabled at any one time..
Currently Licensed Devices	Displays the current devices that are running the Sage 50 Accounts connector that are licensed. To remove the license allocation from a particular device, select it in the list, and click **Remove**. This will allow the license slot to be taken by another device.

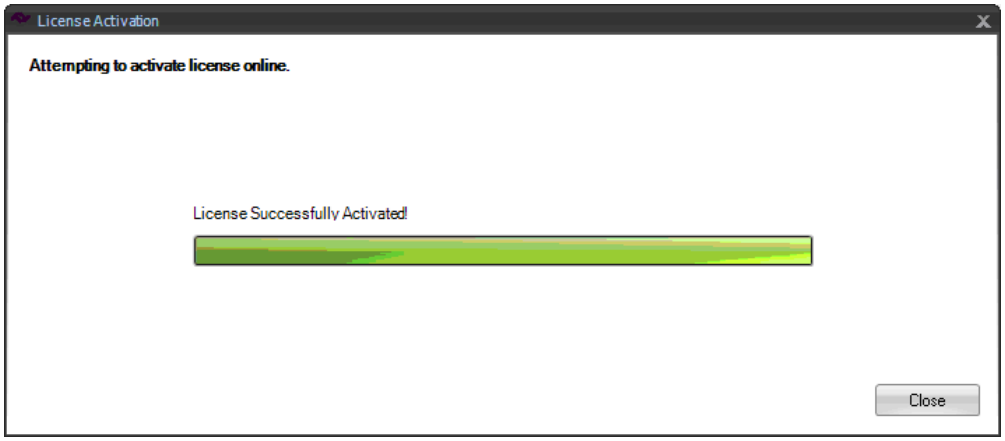
3.3- Activating licenses

When the connector has just been installed, and no license has been applied, the connector runs in Demonstration mode where calls to HP Trim are replaced with static lookups used for demonstration purposes only. When the connector is running in Demo mode, both **Allowed Devices** and **Expiry Date** will display **Demo**.

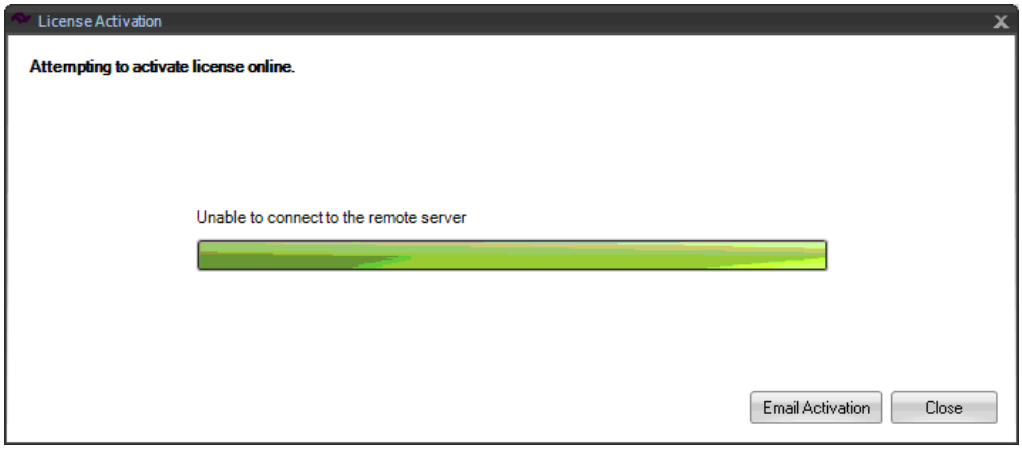
1. To activate the license, click the **Activate License** button.


License Activation
To activate a new installation of the Connector, please enter the details below and choose your activation method.
Company Name:
Number of Devices using this ShareScan Manager:
1
Online Activation
Email Activation
To activate an installation of the Connector using an emailed activation file, click the button below.
Apply Activation File

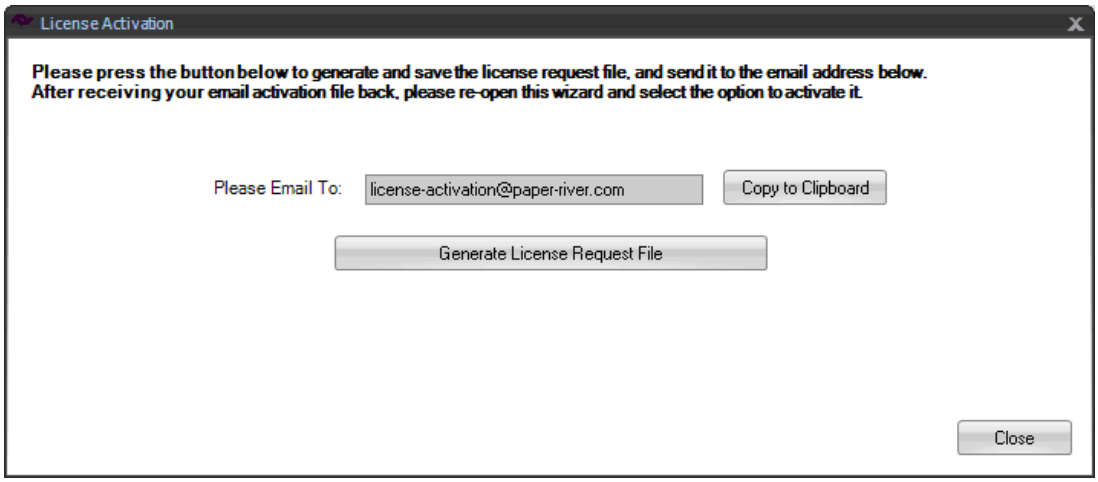
2. The License Activation screen is displayed. You have three options to choose form on this screen:
    1. Fill in the required information, and activate online.
    2. Fill in the required information, and activate by email (For servers without Internet access).
    3. Use an activation file received by email to activate your license.
3. After clicking **Online Activation**, the connector will attempt to connect to the Licensing Server.
4. Once the license has been successfully activated, a **Close** button will appear.



5. If the connector is unable to connect to the licensing server, an error message is displayed, and an **Email Activation** button is displayed. Click this button will take you to the email activation screen, where it instructs you how to email the license request.



6. Compose an email to the email address specified. Click on the **Generate License Request File** button and save the license request file, then attach it to your email.


License Activation
Please press the button below to generate and save the license request file, and send it to the email address below.
After receiving your email activation file back, please re-open this wizard and select the option to activate it.
Please Email To:
license-activation@paper-river.com
Copy to Clipboard
Generate License Request File
Close

7. The license activation file is emailed back to you.
8. To use a license activation file, click on the **Apply Activation File** button. This will prompt you for the location of the activation file sent back to you by email. Select the correct file, and it will be applied.

4 - Usage

In this section, you can find information on various client-side forms.

4.1- Authentication

Depending on your connector settings, you may need to login to Trim before you can start indexing.

4.2- Document Type Screen

Your administrator may have pre-selected a Document Type for scanning. However, if they have not, and Trim has more than one Document Type available, the Document Type selection screen is displayed.

This screen enables you to simply select the type of document that you are scanning into Trim. All you need to do is select one and press **Next**.

4.3- Document Properties Screen

If the selected Document Type has fields associated with it, these are displayed for you to fill out.

Use the scroll buttons on the right hand side to see more fields if there are too many to fit on one page. Each tab within Trim is shown as a different page, and the name of the tab is added to the page title.

Mandatory fields are marked, and if you press **Send** before populating all mandatory fields, you are prompted to fill them in.

If a field is an object, for example, a Classification / Location, a button is displayed to the right of the textbox for the field. You are unable to modify the contents of the textbox directly, but must press the **Search** button to bring up the Search screen.

4.4- Object Search Screen

After pressing search next to a Lookup or a User field, you the object search screen is displayed.

Enter your search string in the search box at the top. Pressing **Search** runs the search on the Trim server, and returns the results to the main list box shown on the screen.

You can now select one of the items and press **OK** to store it in the field.

You cannot press **OK** unless one is selected.

Pressing **Cancel** takes you back to the Document Properties screen without updating the field.

4.5- Send Result

Once the document has been sent to Trim, a result screen is displayed giving you the Record number, then the ShareScan Redirect screen is displayed.

4.6- Demoware

When unlicensed, the connector reverts to a demonstration mode. This is indicated by the word **Demo** in the **Allowed Devices** box on the **Licensing** tab. In the **Upload result** page of the connector, **Demo** is also appended to the **Upload Successful** message.

When in Demonstration mode, there is no communication with the Sage Accounts Server as it is intended for demonstration purposes only.